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4 April 1977

MEMORANDUM FOR: Deputy Director for Administration

25X1A FROM : [REDACTED]
Programs & Budget Staff, OC

25X1A [REDACTED]
Executive Officer, OF

25X1A [REDACTED]
Chief, Information & Privacy Staff, DDA

SUBJECT : DDA Planning Team Conference

1. Attached for your information are minutes of the Planning Team Conference which was held on 25 January 1977.

2. The format of the conference was a minor departure from previous gatherings in that the speakers were invited to address any topic they chose--whether representing their Office or speaking on an individual basis. The audience was asked to operate as a "think-tank" to discuss issues raised by each speaker.

3. The presentations covered diverse subject areas and at times evoked lively comment from the audience. Although a few of the presentations appeared to be of limited interest beyond one or two Offices, the panorama of subject matter provided something for everyone who attended.



Attachment: As stated

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23 March 1977

MEMORANDUM FOR THE RECORD

FROM : [REDACTED]
Management & Assessment Staff, DDA

SUBJECT: DDA Planning Team Conference

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1. The fourth DDA Planning Team Conference was held on 25 January 1977 [REDACTED] The conference was attended by approximately 30 persons representing all DDA Offices and several Directorate Staffs (attachment contains list of attendees).

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2. Conference hosts-- [REDACTED]

[REDACTED] -selected a theme of "Planning, Creativity and Initiative in the Era of Transition." The conference was structured to permit a ten-minute presentation by a representative from each DDA component on ideas for improvement in planning, management, efficiency, productivity, or dollar savings. Each presentation was followed by a short discussion of the subject by members of the audience. The conference schedule also included 45-minute presentations by the A/DDA (DDA Views on Transition) and the A/I/DDA (Status of Committee Investigations Currently in Progress). In the interest of communication, the Conference Hosts requested that a conference report be prepared for distribution to Team members and made available for review by the Deputy Director for Administration.

3. In spite of the ambitious nature of the day's schedule, conference activities stayed reasonably close to the established time frame without cancellation of scheduled presentations. In summary, the conference was fast-paced, included several interesting discussions, and gained the participation of the major part of the audience. The following paragraphs contain a brief synopsis of each presentation and significant thoughts or questions raised during ensuing discussion periods:

The Problem of Training and How OC Copes With It

[REDACTED] briefly traced the history of training in OC, and the problems of adjusting their training offerings to match a rapidly changing technology. It became evident in the mid-60's that conventional approaches to training would

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result in an almost endless drain on training resources--in space, personnel and time. A brief study revealed the increased flexibility in training that is possible through audio-visual techniques; i.e., slide projectors with sound and video players.

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In view of economies possible by producing audio-visuals through in-house facilities, OC undertook development of their multi-media training center. The Center, [REDACTED] has been in operation since January 1975, providing a variety of self-administered programs for overseas and local use, and courses which are administered under an instructor's guidance. Through this multi-media center, OC has the capability of providing a better quality of training to more students in the operation, repair, and maintenance of communications equipment at less cost and in a shorter time frame than was possible through conventional methods.

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OF Preparing for ADP in the Future

[REDACTED] described a Finance Officer's view of the changing computer environment in the Agency over the past 10 years and what lies immediately ahead for components such as OF, which is quickly becoming dependent on computer technologies.

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The Agency underwent a considerable effort in the mid-to-late 60's to consolidate systems computers and computer personnel under a single management. We see in the mid-70's, however, the beginnings of a transition back toward decentralization, where each component has control over their computer resources rather than compete in a centralized environment. Stimulating the transition are evolving software techniques and hardware advances, both of which are quickly becoming more user oriented with time sharing capabilities and data base management facilities available on the less expensive, compact mini-computer.

Adding more weight to the swing of the pendulum is the higher level of education concerning computers and their processes among the user population--particularly among those younger officers who have attended college in the past 5 to 7 years. The Agency's ADP training program has also had its effect on stimulating an active interest in computer technology. In short, computer expertise has found its way into virtually all of the professions in the Agency, not least of which is that of Finance.

The picture which emerges from this trend--observable in private industry and government agencies alike--presents a

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whole new range of questions and uncertainties for Offices such as OF, which is heavily supported by the centralized computer facility and facing new computing requirements almost daily.

How does one prepare to organize for this new scenario? Centralized or decentralized management of computers? To what degree? How do users ensure continuity of programming support if a major ADP management change takes place?

25X1A [REDACTED] also explored several aspects of decentralizing computer personnel and the feasibility of training finance specialists for ADP assignments versus training computer specialists for finance applications. Also raised was the question of whether such decentralized teams would receive technical guidance from a central Office (e.g., ODP), or if the local Offices would have to provide training and technical guidance.

A member of the audience asked if OF was in favor of such an approach, why doesn't OF take steps to add the data entry clerks (ODP'ers assigned to OF) to their T/O. 25X1A [REDACTED] responded that he personally would opt for such an arrangement but such decisions are made at a higher level and may have ramifications that he is not aware of.

Status of Committee Investigations Currently in Process

25X1A [REDACTED] A/I/DDA, presented a brief overview of the activities of the Congressional committees which continue to review various Agency activities. The list of committees includes two separate teams of the House Appropriations Committee, the Senate Select Committee, the House Special Committee on Assassinations and the Individual Rights Subcommittee.

In summary, the committees appear to have an insatiable appetite for information, and frequently go through a tedious page-by-page search of thousands of documents to satisfy their many questions. Investigations often include interviews of Agency employees in pursuit of facts relating to subjects of interest. [REDACTED] pointed out that such interviews are for the purpose of compiling facts as can be recalled by the interviewee and employees should take care not to editorialize on their own answers or observations. 25X1A

25X1A [REDACTED] general observations of the investigations as far as the Agency is concerned were:

Responding promptly and in a forthright manner should be accepted as a way of life--and not a temporary disruption.

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Our relative freedom from close scrutiny over the past 25 years has spoiled us--and we tend to resent the openness which is commonplace in other federal agencies.

We will not return to ways of the past--nor should we want to! We must learn to live with Congressional scrutiny and live with it constructively.

On the negative side, the middle managers' attempts to avoid "flaps" could cause a trend of routinely moving the decision-making process upward. Such a trend could do serious damage to the Agency's management structure as well as affect creativity at these levels. As managers we must take risks--and we must accept the fact that we, our subordinates, our peers, and our superiors will make mistakes along the way.

25X1A In closing, [REDACTED] stated that, "The strength of CIA has been the creativity of its people. We cannot allow our investigations to kill our 'can-do' attitude."

Problems of Personal Rank Assignments (PRA) in DDA

25X1A [REDACTED] addressed the issue of PRA's in the Directorate, the frequent misuse of this facility, and the problems
25X1A which result. [REDACTED] began by stating the four valid reasons for use of the PRA:

- a. An employee was competitively promoted and is awaiting a new position;
- b. An employee assumes a lower-graded position as he is the only qualified individual available for the assignment;
- c. An employee is uniquely qualified for the assignment;
- d. An employee is temporarily assigned to a lower-graded position to gain experience.

25X1A [REDACTED] noted, however, that on the practical side, the PRA is often used for employees who are close to retirement and can "ride out" their final few years without being down-graded. [REDACTED] suggests that the PRA is also used for paternalistic assignments--that is, assignment as PRA for

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those individuals who achieved their rank from past performance but are unable to keep pace with organizational, technological or procedural changes and are kept at their higher grade level because the manager does not have the heart to face the employee with more drastic action. Although this approach is understandable, it is affecting those younger officers who have limited promotional headroom.

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[REDACTED] notes that there are 218 PRA's in the DDA-- 51 that have been extended beyond the two-year period. This does not take into account the double slotting and assignments to development complements throughout the Directorate which adds further seriousness to this issue.

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[REDACTED] suggestions for resolving the PRA problems are:

- to police PRA assignments on a regular basis to assure validity in their use.
- set an absolute two-year maximum on PRA assignments (According to [REDACTED] the regulation sets an established period, but Offices often just automatically renew the PRA as the limit is approached.).
- emphasize this problem and how managers should deal with it in the several management programs offered by OTR.

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Confusion in the Personnel Management Structure

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[REDACTED] OMS, described a situation wherein a basic question relating to personnel policy could evoke diverse and possibly conflicting responses from the various personnel-related systems in the Agency. A line manager may respond differently than a sub-panel member, for example; or an EEO counselor respond differently than a grievance counselor. As another example, a personnel officer may perceive careers as related to the APP or PDP while others do not.

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Citing the preceding discussion on problems with employee career counseling, [REDACTED] advocated a moratorium on proliferating personnel-related systems (command structure, career structure, EEO programs, APP and PDP, panels, grievance counselors, etc.) in the Agency.

A member of the audience stated that EAG was undertaking a review of certain personnel policies (such as promotions and

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separations) which may lead to some changes in the area of personnel management.

Initiative at the Project Level

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[REDACTED] OP, presented an overview of OP's recent efforts toward improving the cost effectiveness and timeliness of the system to monitor status of applicant processing.

The routine portion of applicant processing presently involves much typing, filing, retrieving, and follow-up. Because the operation is decentralized, some duplication of card files does result and time is lost when cross checking is required.

In considering the applicant processing function as a candidate for a computerized system, OP staffers saw the long lead time required for system implementation where OP resources were involved. They also examined the need for quick response time and high reliability, and did not consider that the ODP on-line system matched the mini-computer in these aspects.

The study indicated that the proposed system would save manpower, provide accurate and timely data, and result in a 5-year savings of \$50,000.

Planning Initiative in Office of Security

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[REDACTED] OS, began his presentation by describing some of the typical but unscheduled tasks which regularly confront a plans staff: IG investigations, preparing reports for OLC and OGC, responding to Comptroller requirements, and dealing with requests levied by the many investigating committees. On top of this, [REDACTED] explains, are the scheduled tasks of reviewing regulations, preparing reports, program call, etc., all of which leave little time for actual planning or policy consideration or improving the administrative activities of the component.

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In spite of the heavy load of activities facing the OS Plans Staff, three internal projects were instituted and carried out on a priority basis. The first of these was a paper flow study: a review of the documents, papers, memos and other media which were finding their way to Director of Security's in-box for action, approval, or concurrence. The first phase of the review resulted in the downward delegation of 13 separate action types, relieving the Office Director of handling a lot of paper and making decisions which are more appropriately made at a lower level. The second phase of the program has the DD/S reviewing incoming paperwork to further delegate approval authority.

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The second program undertaken by OS was to gain a better understanding of the MBO process. MBO to some OS staffers appeared to be mildly understood, misunderstood by others and close to an occult religion with still others. As a means of gaining a uniform understanding of, and appreciation for, MBO, OS staffers arranged for two MBO training sessions tailored to OS requirements. The first of the three-day sessions was attended by 27 Security Officers and deemed highly successful. The second session is scheduled for March.

The final project discussed [REDACTED] was the development of a survey of attitudinal changes of Security Officers over an extended period of time. The longitudinal surveys are keyed to measure one's changing perception of the roles of the CIA, OS, self, one's career, etc. The survey process was begun with a recent class of new Security Officers and will be repeated every three years as these officers progress through their careers, a new series will be initiated with each future Security Officer Training Program.

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Significant Savings Through Purchase of Equipment

[REDACTED] ODP, discussed the potential cost advantages in purchasing rather than leasing certain types of equipment. [REDACTED] cited examples of recent savings by ODP in the purchase of computers, computer peripherals and word processing equipment. [REDACTED] suggested that every component should review equipment being leased or being planned for purchase.

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It was noted that certain circumstances may outweigh the cost advantages of purchasing. These include short-term requirements for the equipment, the eventual loss of maintenance and/or spare parts by the manufacturer, or equipment which is subject to rapidly changing state of the art. [REDACTED] stated that in borderline cases, or in situations of short-term requirements, it may still be advantageous to the Government to purchase the equipment to cover requirements in other components which could be satisfied through redistribution of the equipment.

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Contingency planning for paramilitary requirements is initiated by the DDO, while Office of Logistics recommends the equipment types most useful for the projected activities. The equipment is stocked in various configurations to facilitate shipment when called for. An example of the speed that

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Transition Experiences in the DDA

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Mr. Mike Malanick, A/DDA, discussed the key activities of the Agency during the recent presidential transition period. 25X1A
Prior to the election, [REDACTED] was appointed as briefing contact for the then nominee, Jimmy Carter. [REDACTED] briefings for Mr. Carter involved virtually all of the substantive issues in which the Agency was involved, although the information was largely sanitized.

After the election, a communication network was extended to Americus, Georgia to facilitate communications to President-Elect Carter from the White House and the Agency. Agency transmission to Mr. Carter included the President's Daily Brief, with follow-up elaborations on certain issues, and biographic reports on certain foreign leaders. In addition to providing communications channels, DDA also provided security and logistics support to the President-Elect during this period.

Following Mr. Sorenson's nomination as the DCI, DDA began taking measures to provide the necessary personal amenities for the new DCI-designate: personal security (auto, house), transportation of certain material, briefings on employee benefits, etc.

In looking to the future, Mr. Malanick stated that the Comptroller's Office felt there would be little impact work-wise resulting from Zero-Based Budgeting as it is patterned closely to our present Resource Package System. Excerpts from a recent Presidential Review Memo read to the audience suggested several changes that Mr. Carter will make in the near future to streamline procedures in the Intelligence Community structure. Mr. Carter prefers the use of Presidential Directives, for example, rather than NSC memos produced during the Ford Administration. Mr. Malanick also foresaw revisions to Executive Order 11905 in the coming months.

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In response to a question concerning how the DDA and A/DDA view the role of the Planning Team in Directorate activities, Mr. Malanick said he sees the Planning Team as an aid to the Deputy Director in resolving cross-organizational situations and as a responsible group of middle-level people to air problems to bring to the attention of the front office. Although this appears, on the surface, to be similar to the functions of the MAG and ADMAG, the Planning Team is a different type of group and are more acutely aware of many of the operational problems in and among Offices than are the MAG groups.

ADP in OTR

25X1A [REDACTED] OTR, discussed ways in which the computer has been used to assist in the control of projects and administrative actions in Office of Training. The idea to use the computer (e.g., a Delta terminal located in Chamber of Commerce Building linked to the VM system in the General Computer Center in Headquarters) for this purpose grew out of Mr.

25X1A [REDACTED] attendance at OTR's Information Science for Management course. The course (among other things) advocated the use of information science techniques to help managers in doing their job. After the administrative arrangements (i.e., acquire password, user ID, mini-disc space and "how-to" documentation) and appropriate technical study were completed, several programmed routines were developed and lists of activities of which to keep track were entered into the system. The systems are updated (through the terminal) as events take place, or as new requirements are received. The system is queried each Friday to set out the list of actions scheduled to take place the following week. The "Do-List" produced by the query lists coming requirements according to priority levels, action items (e.g., fitness reports), meetings scheduled or to be scheduled and a special section on [REDACTED] support requirements.

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Whither Goest the Planning Team

25X1A [REDACTED] O/DDA/CMO, asked the audience to consider the question of the usefulness of the DDA Planning Team concept, whether it should be continued, and to what end. Ms. Helen [REDACTED] C/M&AS, speaking from the audience, cited the major purposes of the Team as to provide a mechanism for Planning Staffs to get to know one another and to better understand each other's activities, problems, etc. [REDACTED] also stated that the original idea was to experiment with this method of meeting--each quarterly meeting organized by different members

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of the Team--over a period of one year. In that this meeting marks the end of that period, we should now consider what action should be taken to evaluate the Team's progress. Ms. [REDACTED] suggested the next step would appear to be to appoint a small committee of Team members to assess the activities of the Team over the year, the format of the meetings, and the subject matter discussed. Are we discussing matters of interest, for example, or would other topics be more appropriate? Several members stated their support of the Team and suggested we might consider a meeting where office organization and functions were presented, so that some of the topics raised by each Office would be better understood.

Conclusion

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[REDACTED] M&AS, concluded the meeting by noting that the wide range of topics presented in today's meeting seems to indicate a growing diversity in planning duties and an increasing emphasis on the process of planning. New concern toward ADP projects improved personnel systems, and doing things more efficiently at less cost are rapidly becoming an integral part of the planners' activities. This, coupled with the activities and changes facing us as presented by the guest speakers suggest an almost urgent need to look beyond the traditional concept of planning as a functional or budgetary process to one which includes a project's environment, its legality, its place in the organization, and its impact on it.

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[REDACTED] extended his compliments to each of the speakers and appreciation to the hosts for arranging an interesting and valuable meeting.

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Next 2 Page(s) In Document Exempt

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